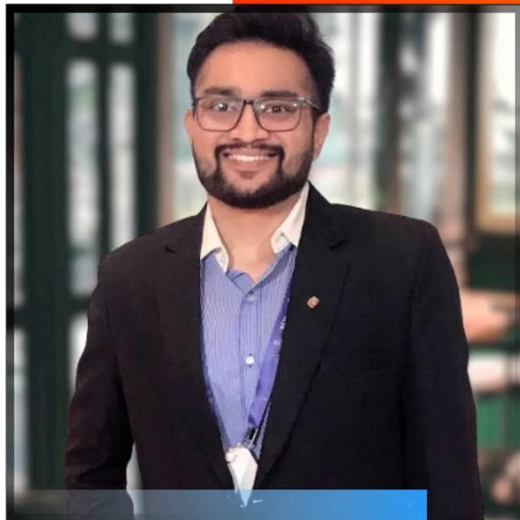


# Advanced Segmentation Audits: Ensuring Precision and Performance in Marketo Engage

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**Adobe**

# Introductions



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3x Marketo Champion, Adobe Marketo Engage Architect, Expert

Adobe Subject Matter Expert

Community Advisor, Champion of the Year 2022 and 2023



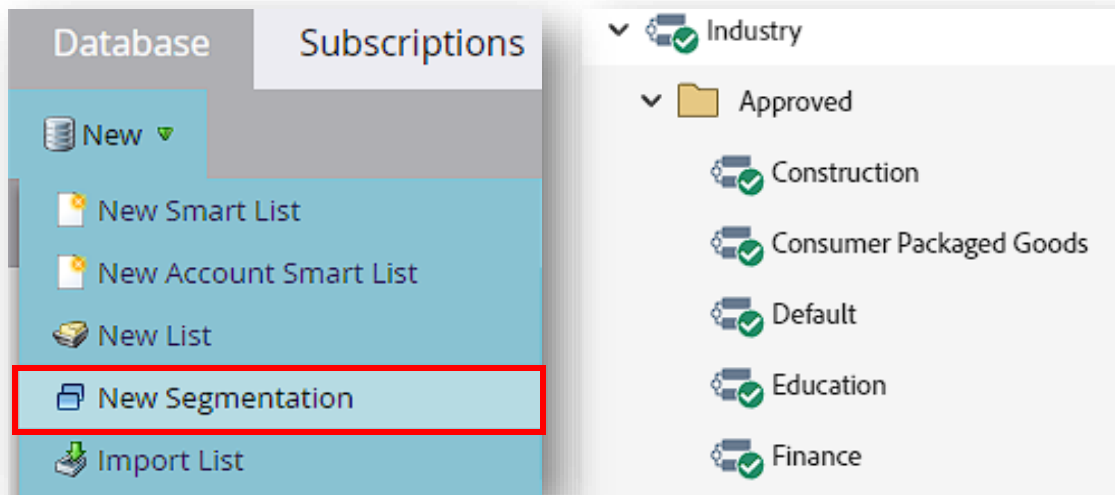
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Purple Me Up

# A Quick Segmentation Refresher: Uses and Benefits

- Segmentations allow marketers to create **logical groups of people** in the Marketo Engage database who share similar characteristics, needs, behaviors, or preferences
- Enhances marketing precision, ensuring that messages resonate with the audience
- Database > Segmentations > New > New segmentation

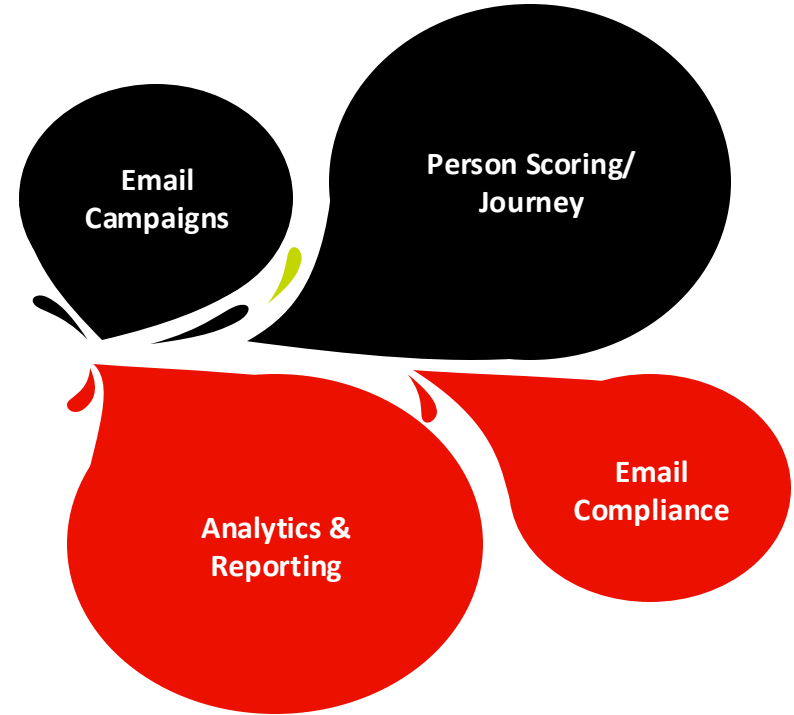


# A Quick Segmentation Refresher: Uses and Benefits

Improved engagement rates  
and conversion rates.

Enhanced CX through  
personalized messaging  
(including VTL).

Easy to setup and use.  
Updates real-time (unlike  
Smart List)



# Champion Top Tip: Segmentation vs. Smart List

|                       | Segmentations   | Smart Lists   |
|-----------------------|---|---|
| Update Cadency        | Updating in real-time.  | Updated only when refreshed/referenced by other assets or Smart Campaigns.                                |
| Use Cases             | Membership can be used in Velocity Script for advanced personalization use cases and Smart List membership.   | For conventional filtering (Smart Campaign/report e.g., custom columns in People Performance Report).     |
| Update Record         | Updates are logged as activities in Marketo Engage's Activity Log.  | Updates are not recorded in Marketo Engage's Activity Log.  |
| Limitation on Filters | Restrictive in terms of the number and type of filters. There is a hard limit on the number of segmentations and segments one can create within a segmentation. | All filters including special, CRM, and member of Smart List are available to use.                        |
| Approval Process      | Requiring additional review and approval process.   | The process for creating and updating a Smart List is simpler and involves fewer steps than segmentation. |

# Segmentation: Why Periodic Review and Updates?

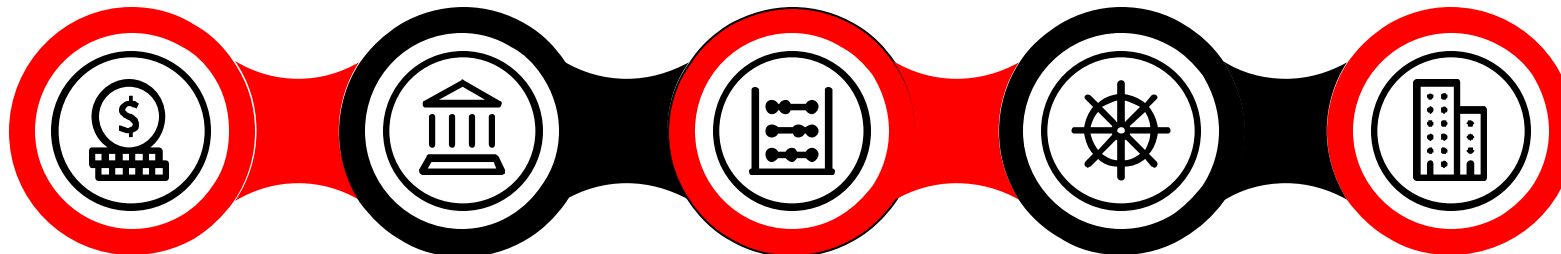
Segmentation is key to targeted marketing, but as conditions change, so must your segments.

## Data Freshness

For new attributes (like demographics or purchase history), update your segmentation to reflect this evolving data.

## Business Changes

New market entries or product launches may render existing segments irrelevant, necessitating adjustments.



## Behavioral Changes

Evolving prospect behaviors with new products or market shifts. Regular segmentation reviews ensure prospects are grouped based on their latest interactions, such as shifting buying patterns.

## Marketing Underperformance

If your Marketing campaigns aren't driving expected engagement or conversions, outdated or misaligned segmentation rules could be the issue.

## GDPR/Compliance

Segments based on personal data need regular audits for compliance with privacy regulations, ensuring consent and customer preferences are respected.

# How to Review and Update your Segmentations

1

**Access Segmentation Rules:** Navigate to **Database > Segmentations** to view all active segmentations.

2

**Review the existing Segmentation rules in the Approved version.**

- Segments
- Segment Criteria
- Number of People in each and the Default Segments

3

**Edit Segmentations:**

- Select the segmentation you want to update.
- Click Segmentation Actions > Edit Segmentation to modify the criteria based on updated data.
- Ensure your segments remain relevant by reflecting current insights.

4

**Preview and Test Changes:** Before Approving, thoroughly preview and test the Draft version.

# Segmentation Review

**1** Adobe Marketo Engage Database

Database

Search within tree

- Default
  - Field Organizer
  - System Smart Lists
  - Group Smart Lists
  - Group Lists
  - Segmentations
    - 052020-Test Segmentation
    - BillingAddressCountry
    - City

**2** Adobe Marketo Engage Database Deloitte Sandbox

Database

Search within tree

- BillingAddressCountry
  - Approved
    - Default
    - IN
    - UK
    - US

IN People Smart List

IN

People

**3** IN People Smart List

New This Segmentation is approved and may not be edited

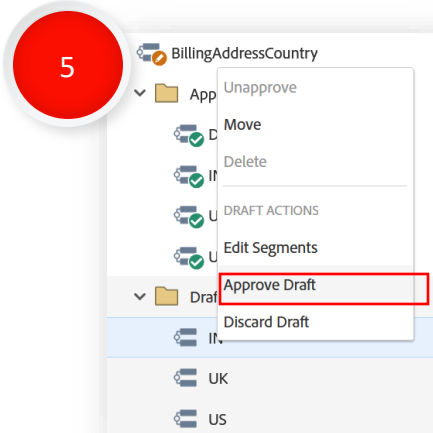
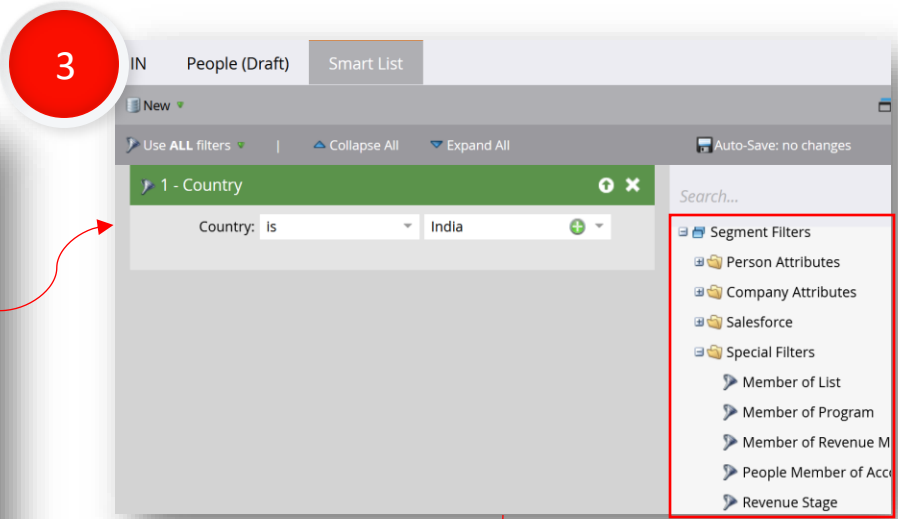
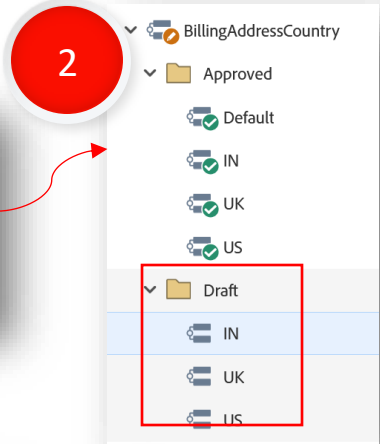
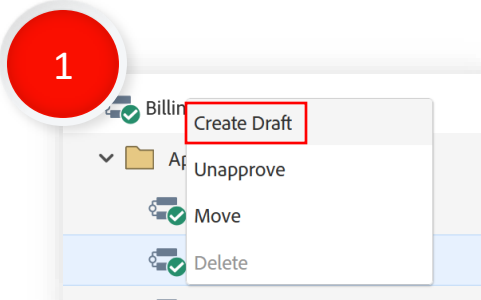
Use ALL filters Collapse All Expand All

1 - Country

Country: is India



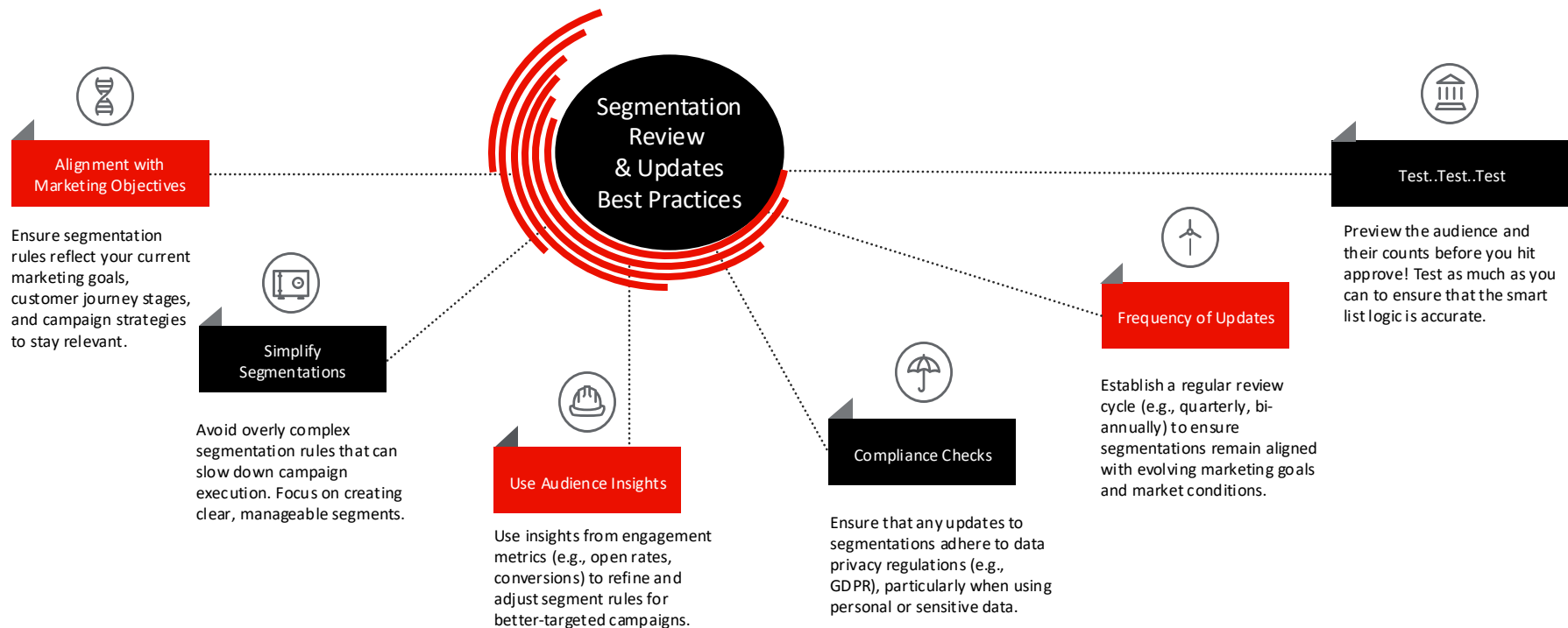
# Segmentation Updates



4

| Segmentation Name | Test Steps   | Expected Segmentation                       | Actual Segmentation | Test Record | Pass/Fail? | Notes |
|-------------------|--|---|---------------------|-------------|------------|-------|
| Billing Country   | 1. Create a test record with: Country = India                                      | India                                       |                     |             |            |       |
|                   | 1. Create a test record with: Country = United States                              | US  |                     |             |            |       |
|                   | 1. Create a test record with: Country = United Kingdom                             | UK  |                     |             |            |       |
|                   | 1. Create a test record with: Country = NULL<br>2. Change Country = India          | Segment should change from Default to India |                     |             |            |       |
|                   | 1. Create a test record with: Country = NULL<br>2. Change Country = United States  | Segment should change from Default to US    |                     |             |            |       |
|                   | 1. Create a test record with: Country = NULL<br>2. Change Country = United Kingdom | Segment should change from Default to UK    |                     |             |            |       |
| Billing Country   | 1. Create a test record with: Country = NULL<br>2. Change Country = Bhutan         | Segment should remain Default               |                     |             |            |       |

# Best Practices



# Monitor Segmentation Performance

- **Campaign Reports & Performance Analysis:** Use Marketo Engage Analytics to run reports on segment-specific campaign performance (like email open rates or conversion rates).
- For advanced use cases, apply UTMs to track CTA performance and even use Velocity Scripting for personalized tracking.

Email Performance Report Smart List Setup

Settings

| Setting                   | Value                 |
|---------------------------|-----------------------|
| Sent Date                 | All Time              |
| Global Reporting          | Disabled              |
| Hide Deleted/Merged Leads | Disabled              |
| Export Rows Available     | 5,000                 |
| Group by Segmentations    | BillingAddressCountry |

Filters

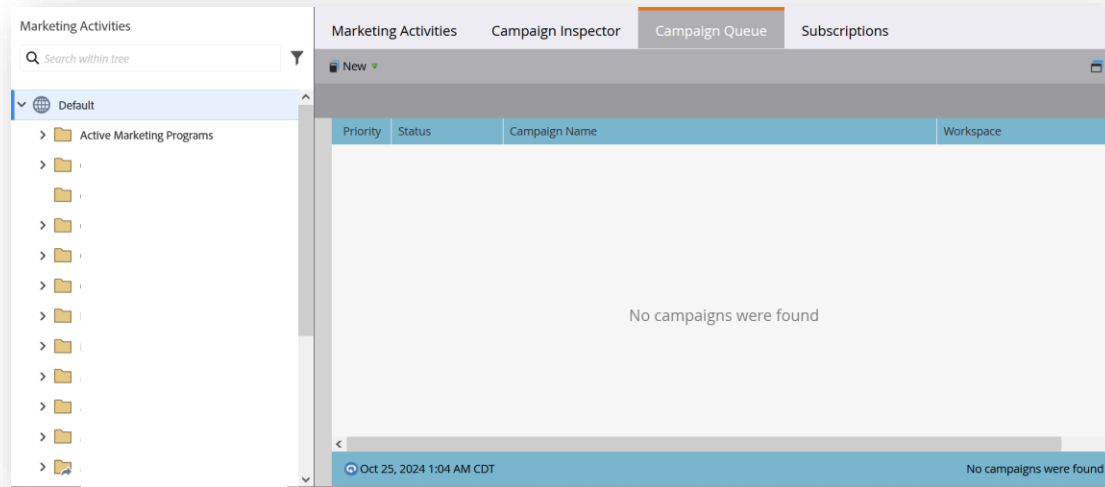
- Marketing Activities Emails
- Selected Emails

Email Performance Report Smart List Setup

Sent Date: All Time Smart List: no rule

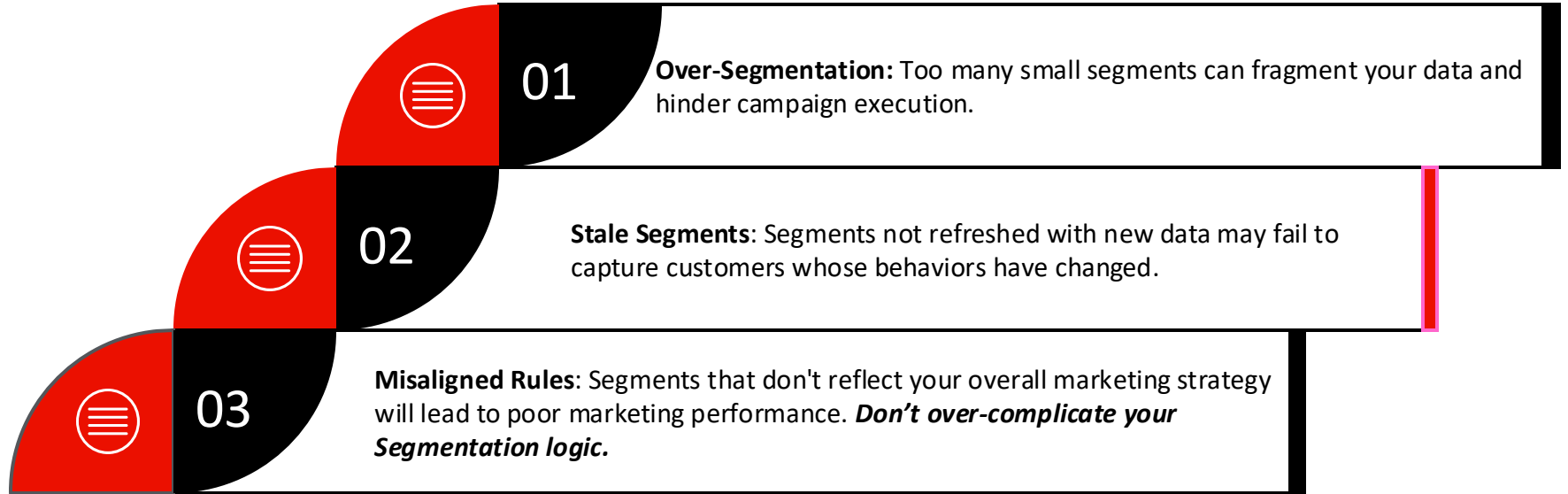
| BillingAddressCountry | Sent       | Delivered  | % Deliv...   | Hard B... | Soft Bo... | Pen...   | Open...   | % Op...      | Clicke... | % |
|-----------------------|------------|------------|--------------|-----------|------------|----------|-----------|--------------|-----------|---|
| Default               | 370        | 226        | 61.1%        | 46        | 98         | 0        | 85        | 37.6%        | 29        |   |
| IN                    | 36         | 19         | 52.8%        | 0         | 17         | 0        | 3         | 15.8%        | 0         |   |
| UK                    | 2          | 0          |              | 2         | 0          | 0        | 0         |              | 0         |   |
| US                    | 6          | 0          |              | 6         | 0          | 0        | 0         |              | 0         |   |
| <b>Total:</b>         | <b>414</b> | <b>245</b> | <b>59.2%</b> | <b>54</b> | <b>115</b> | <b>0</b> | <b>88</b> | <b>35.9%</b> | <b>29</b> |   |

# Monitor Segmentation Performance



- Delays in Campaign Execution: Delays in campaign rollout could signal inefficient segmentation. If segments are overly broad or complex, they can slow the system. Review your Campaign Queue regularly, especially during peak times.
- Remember, Segmentation updates each time your database updates! It's real-time and, hence, resource-intensive.

# Major Segmentation Pitfalls



# Next Steps

## 1. Identify relevant Segmentations:

Review all the Segmentations you have in your instance and identify the ones that are being used and are relevant to you. Unapprove the obsolete.

## 2. Schedule regular audit sessions:

Establish a routine (e.g., quarterly) to review and update segmentation rules, ensuring they align with current business objectives and customer data.

## 3. Simplify and optimize rules:

Review segmentation criteria to eliminate complexity. Focus on rules that deliver meaningful segmentation without over-segmentation.

## 4. Incorporate data insights:

Use email and campaign performance metrics and new data attributes to refine segmentation logic and keep it relevant.

## 5. Test before implementing:

Create a detailed test plan (excel worksheet) with all the test scenarios defined. Create test records as per the testing plan and ensure they land in the correct segment.

# Appendix

- [Create a Segmentation](#)
- [Edit a Segmentation](#)
- [Marketo Success Series: Segmentation](#)
- [Segmentation Health Check Updates – Tips and Tricks for Keeping Your Segmentation Updated](#)
- [Email Performance Report](#)

# Questions?

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Share Your Feedback With  
Us.

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# Thank You!

## Upcoming Events:

- Attend the [December User Group meetings](#) in your city or virtually
- March 20th: [Register](#) for The Skill Exchange for Marketo Engage at Adobe SUMMIT 2025



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